

Overview

Approved Admin Staff have the ability to act on behalf of the Agency Managers within the Agency, enabling them to step in to complete tasks or assist consumers with the online application.

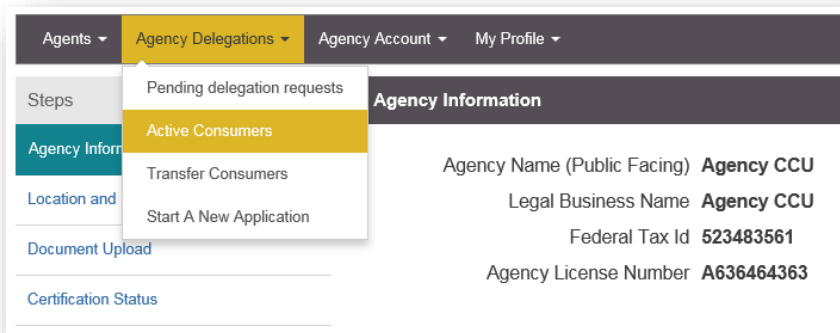
Approved Admin Staff can:

- [View Consumer details](#)
- [Accept an Agent's pending delegation requests](#)
- [Complete and submit an application for a consumer on behalf of the Agent](#)
- [Start An Application On Behalf of an Agent](#)
- [Call the Agent Service Center](#)

View Consumer Details

Approved Admin Staff, both Levels 1 & 2, have access to view consumer details for all consumer cases delegated to Agents within the Agency. They do not have access to export an agent or agency Book of Business.

From the dashboard, under the "Agency Delegations" tab drop-down menu, select the "Active Consumers" link to navigate to the "**Active Consumers**" page.




The "Active Consumers" page will display all of the consumers delegated to Agents within the Agency.


| Active Consumers | | | | | |
|--------------------------|---------------------|---|--|----------------------------|-------------------|
| Search | | | | | + |
| Sort By: First Name A-Z | | | | | Change Delegation |
| SELECT | HOUSEHOLD | CASE DETAILS | COVERAGE | AGENT | ACTIONS |
| <input type="checkbox"/> | Christopher Wallace | Case ID: 5000010123 Application Year: 2018 | blue of california Silver 70 HMO Trio Plan Type: HMO Premium: \$411.53/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2500.0 | Francesca Agent A121796 | |

Approved Admin Staff are able to view the consumer information and application for any agent listed in this list.

This section displays:

- Consumer Name
- Case Number
- Application Year
- Health Plan Information (if applicable)
- Agent Delegated to the consumer case
- Agent License Number
- Edit Menu 

| SELECT | HOUSEHOLD | CASE DETAILS | COVERAGE | AGENT | ACTIONS |
|-------------------------------------|----------------------------|------------------------------------|--|----------------------------|--|
| <input checked="" type="checkbox"/> | Christopher Wallace | Case ID: Application Year: 2018 | blue of california Silver 70 HMO Trio Plan Type: HMO Premium: \$411.53/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2500.0 | Francesca Agent A121796 | Account Household ✓ Eligibility Mark as Inactive Change Delegation |

To view additional consumer data, click on the  and click on the “Household” and/or “Eligibility” links to view additional consumer information.

Household Information displays:

- Consumer Name
- Relationship to Primary Contact
- Date of Birth
- Gender
- SSN Information
- Home and Mailing Address
- Seeking Coverage Information

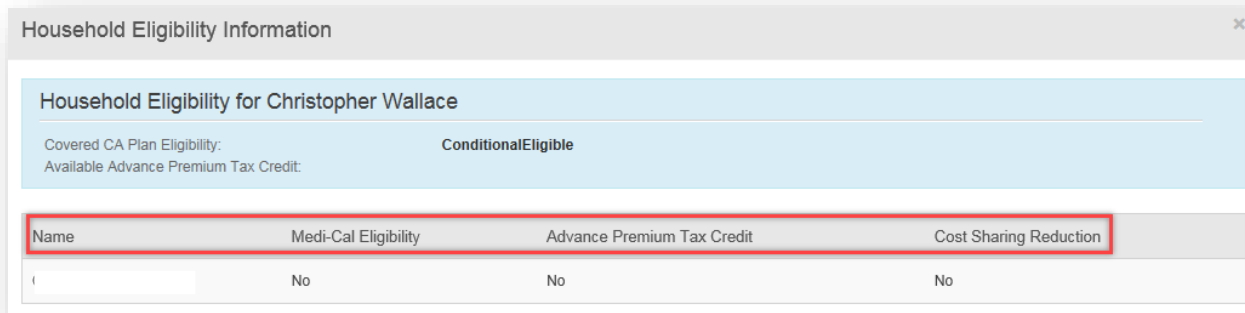
Household Member Information

Household Composition for Christopher Wallace

| Name | Relationship | Date of Birth | Gender | SSN Information | Home Address | Mailing Address | Seeking Coverage? |
|------|--------------|---------------|--------|-----------------|---|---|-------------------|
| | SELF | 06/16/1978 | Male | 888998860 | 2329 Gateway Oaks Drive Sacramento, CA 95833 | 2329 Gateway Oaks Drive, Sacramento, CA CA 95833 | Yes |

Household Eligibility section displays:

- Covered California Eligibility Status for the Household
- Available Advance Premium Tax Credit (Dollar Amount)
- Name of the Consumer
- Medi-Cal Eligibility Status
- Advance Premium Tax Credit Status
- Cost Sharing Reduction Status



Household Eligibility Information

Household Eligibility for Christopher Wallace

Covered CA Plan Eligibility: **ConditionalEligible**

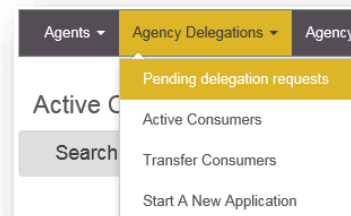
Available Advance Premium Tax Credit:

| Name | Medi-Cal Eligibility | Advance Premium Tax Credit | Cost Sharing Reduction |
|------|----------------------|----------------------------|------------------------|
| (| No | No | No |

Accepting Pending Delegations on Behalf of an Agent

Approved Admin Staff, Level 2, can accept pending delegation requests on behalf of the agents within their agency.

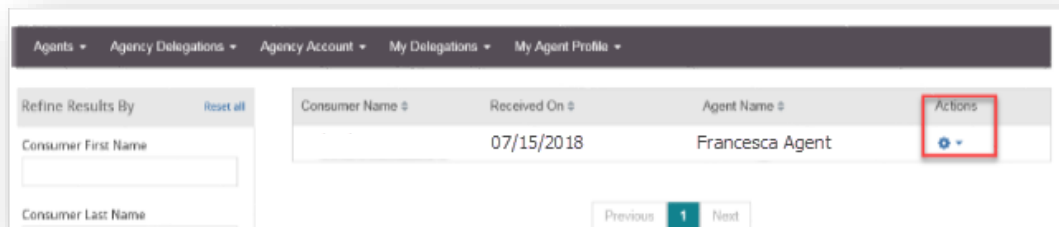
Approved Admin Staff navigate to the **Agency Delegations** drop-down menu and select "Pending Delegation Requests" from the options.



This will navigate the Approved Admin Staff to the "Pending Delegations" page. The Approved Admin Staff will see a list of all consumers requesting delegation with agents within the agency.

The page displays:

- Consumer Name
- Received on: Date the Request was made by the consumer
- Agent Name: The Agent Requested as a Delegate
- Actions Column



Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾


Refine Results By [Reset all](#)

Consumer First Name

Consumer Last Name

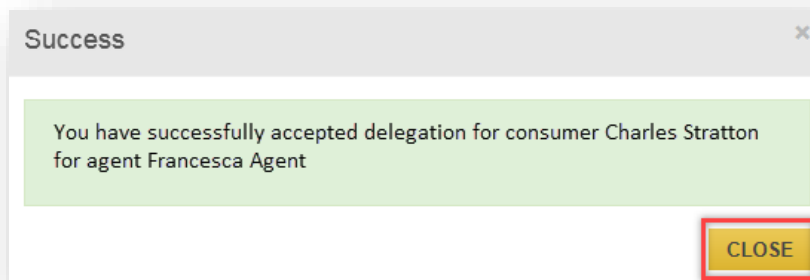
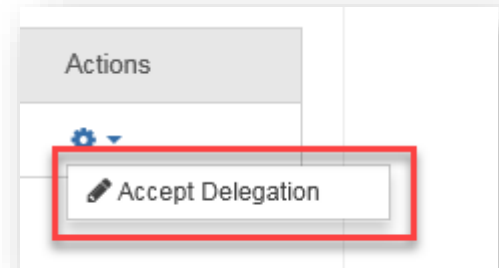
| Consumer Name | Received On | Agent Name | Actions |
|---------------|-------------|-----------------|---------|
| | 07/15/2018 | Francesca Agent | |

Previous 1 Next

From the **Actions** column, the Approved Admin Staff will click the  and the “Accept Delegation” link will display.

Click on “Accept Delegation” to accept the delegation on behalf of an Agent.

The Approved Admin Staff will get a pop-up confirmation screen:

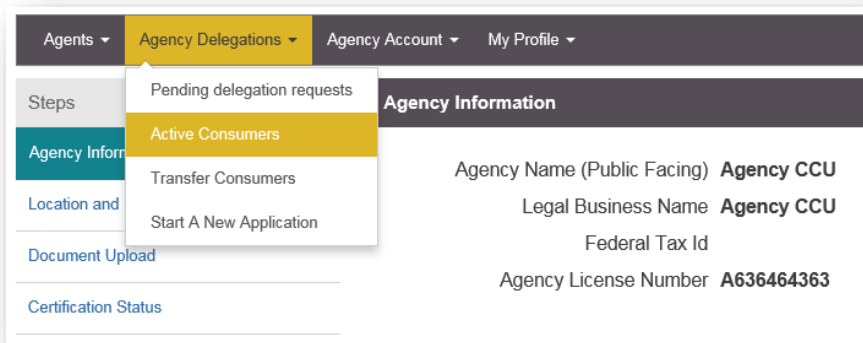


Select “Close” to finalize the delegation to the agent within your agency.

Complete and Submit an Application on Behalf of an Agent

Approved Admin Staff, Levels 1 & 2, have the ability to assist consumers delegated to the Agents, within the Agency, with application changes and submitting new applications.

In the **Agency Delegation** drop-down menu, select “Active Consumers”.





Acting on Behalf of an Agent Job Aid Approved Admin Staff



The Approved Admin Staff is navigated to the **Active Consumers** page where there is a complete list of all consumers delegated to Agents within the Agency.


Here, the Approved Admin Staff can select the consumer they need to assist with their application.

Active Consumers


Search 


Sort By: First Name A-Z  [Change Delegation](#)



| SELECT | HOUSEHOLD | CASE DETAILS | COVERAGE | AGENT | ACTIONS |
|--------------------------|-----------|---|--|----------------------------|---|
| <input type="checkbox"/> | | Case ID: 12345678 Application Year: 2018 | blue  of california Silver 70 HMO Trio Plan Type: HMO Premium: \$411.53/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2500.0 | Francesca Agent A121796 |  |

When the Approved Admin Staff selects the consumer, they can access the consumer case by: clicking the consumer's name, OR selecting  and then clicking the "Account" link.

Active Consumers


Search 

Sort By: First Name A-Z  [Change Delegation](#)

| SELECT | HOUSEHOLD | CASE DETAILS | COVERAGE | AGENT | ACTIONS |
|--------------------------|-----------|---|--|----------------------------|--|
| <input type="checkbox"/> | | Case ID: 12345678 Application Year: 2018 | blue  of california Silver 70 HMO Trio Plan Type: HMO Premium: \$411.53/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2500.0 | Francesca Agent A121796 |  <ul style="list-style-type: none"> Account Household Eligibility Mark as Inactive Change Delegation |

A popup message will display, confirming that the Approved Admin Staff wishes to navigate to the consumer's individual application.

If Approved Admin Staff selected the wrong consumer, the Approved Admin Staff will select "Cancel" button and navigate back to the **Active Consumer** page.
The Approved Admin Staff will select "Consumer Application" button to continue to the application homepage.

View Consumer Application 

Click on Consumer Application to go to the consumer portal for Christopher Wallace. You will be able to complete the application, make changes, or select a plan on behalf of the consumer.

Proceed to the consumer portal?

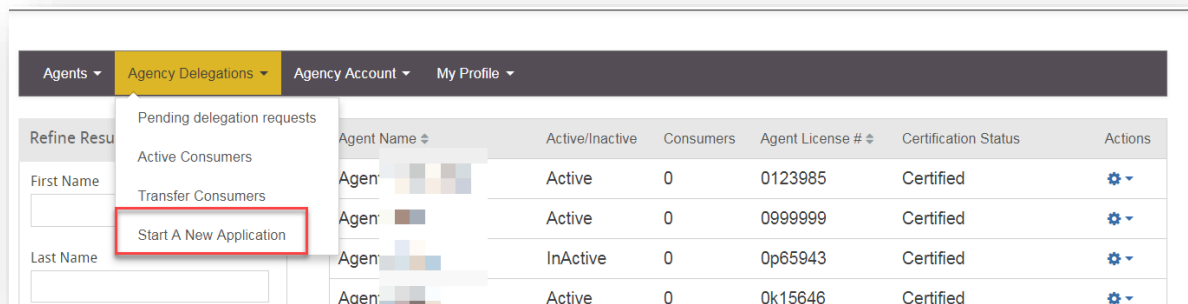
☐ Don't show this message again

The Approved Admin Staff are able to start a new application, complete a Report a Change, submit the application for an eligibility determination and upload eligibility documents.

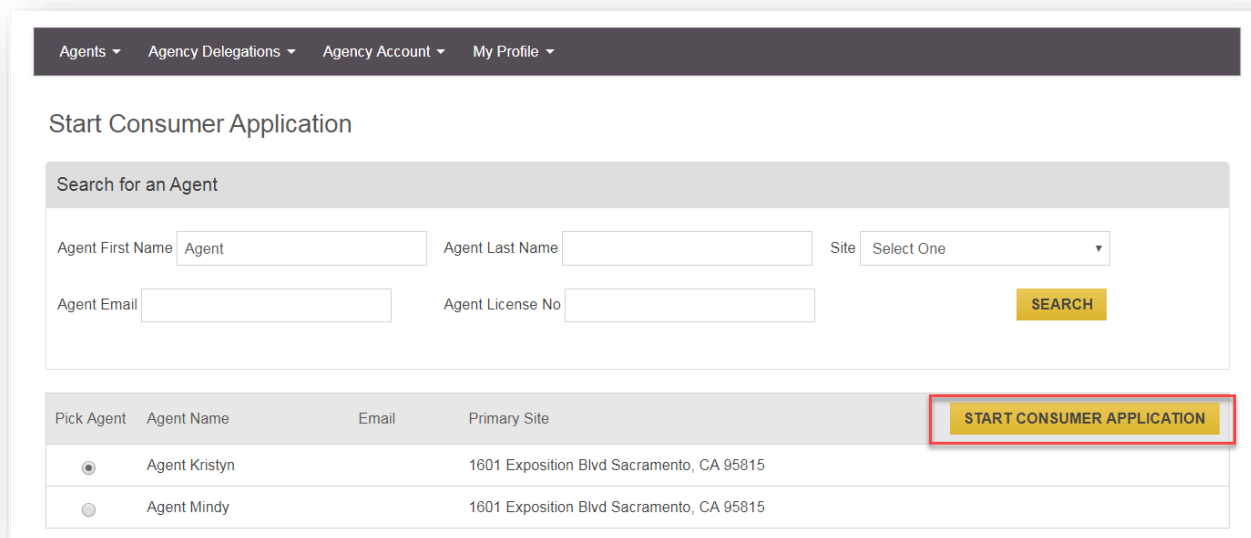
Start New Applications on Behalf of an Agent

Approved Admin Staff, both Levels 1 & 2, have access to begin new applications for consumers on behalf of an agent within the agency. They do not have the ability to plan select, terminate participation, or change APTC.

From the dashboard, under the “Agency Delegations” tab drop-down menu, select the “Start A New Application” link to navigate to the **Start A New Application** page.



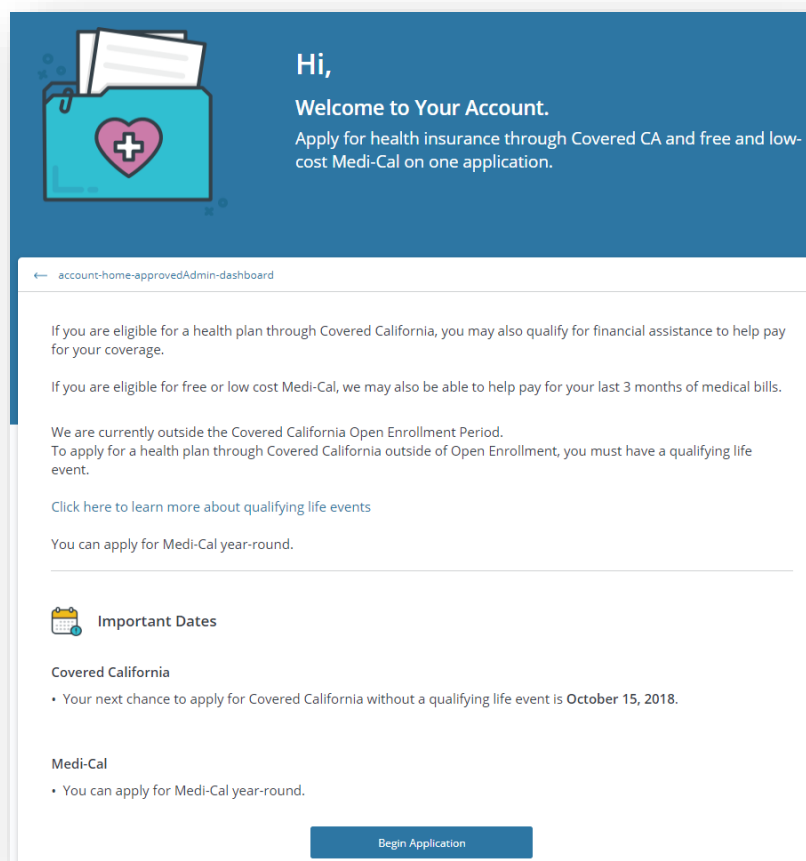
From the **Start a New Application Page**, the Approved Admin Staff will search and locate an Agent to assign as the Agent of Record to the new case.



The screenshot shows the 'Start Consumer Application' page. It has a search section with fields for Agent First Name, Agent Last Name, Site (dropdown), Agent Email, and Agent License No. A 'SEARCH' button is present. Below the search section is a table with columns: Pick Agent, Agent Name, Email, and Primary Site. Two agents are listed: Agent Kristyn and Agent Mindy. A red box highlights the 'START CONSUMER APPLICATION' button in the top right corner of the table area.

| Pick Agent | Agent Name | Email | Primary Site |
|----------------------------------|---------------|-------|---|
| <input checked="" type="radio"/> | Agent Kristyn | | 1601 Exposition Blvd Sacramento, CA 95815 |
| <input type="radio"/> | Agent Mindy | | 1601 Exposition Blvd Sacramento, CA 95815 |

After selecting the Agent from the results of the agent search, the Approved Admin Staff will select the “Start A New Application” button to navigate to the application homepage to initiate the new application on behalf of the Agent.



Contact the Agent Service Center

Approved Admin Staff, both levels 1 & 2, are able to contact the Agent Service Center when in need of assistance.

Contact via:

- Phone: (877) 453-9198
- Email: agents@covered.ca.gov

View the [Hours of Operation](#) for a full list of availability.